

2006 Business Plan

TOM DALY
ORANGE COUNTY CLERK-RECORDER

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I. EXECUTIVE SUMMARY

The Clerk-Recorder's 2006 Business Plan is an overview of the services the department provides, a listing of the year 2005 accomplishments, goals for 2006 and the strategies to achieve those goals.

Our mission statement defines the department's commitment to the public:

"The Clerk-Recorder Department's mission is to provide a reliable repository for public records and to provide efficient service to the public in a way that exemplifies the highest standard of courtesy, cost effectiveness and ethical performance. Public records will be readily accessible in a convenient manner while safeguarding confidentiality and the security of those records."

The Clerk-Recorder Department has 102 staff members and is comprised of two (2) major divisions, the Recorder function and Clerk function. The Recorder function records and processes real property documents. The Clerk function issues marriage licenses, accepts passport applications, files fictitious business statements, provides birth, death and marriage certificates, and handles official records requests. The Clerk-Recorder also oversees the Orange County Archives.

During the past year, we handled record or near-record levels of transactions in the majority of our business areas, further enhanced our strong financial position, and once again received high marks from the public and our industry users for our customer service.

In 2005, the department recorded its fourth consecutive year of recording over one million property-related documents. We responded to this workload without an increase in staffing by continuing our multi-year commitment to develop and implement state-of-the-art technology and expanding the cross-training efforts of staff.

As always, customer service is a constant, everyday priority. For calendar year 2005, the Clerk-Recorder Department served over 52,000 walk-in customers and received nearly 100,000 telephone calls. We are proud to report that in recent surveys and customer feedback, approximately 98% of respondents had positive comments regarding their experience or rated our services either "excellent" or "very good." The department also received high marks in the areas of customer assistance, efficiency and overall performance.

Looking forward to 2006, the Clerk-Recorder Department will continue to be an innovative leader in implementing technological applications for public accessibility to records and the on-going protection and safekeeping of vital documents and information.

In addition, the department will continue addressing and developing solutions to the challenges within our industry including enhancing public record accessibility and safeguarding the security of those public records.

By emphasizing our commitment to increase the accessibility of our services, we have not only opened a new satellite branch office in south Orange County, but continue to increase our website content as well as maximize our customer service staff resources.

As part of our goals in addressing the safeguarding of public records in 2006, we will continue our involvement with local, statewide and federal agencies and entities on this issue.

Finally, we would like to highlight some of the our accomplishments in 2005:

- We redesigned and implemented enhancements to our website including suggestions made by the public. On average, over 1,100 people access our website daily which makes the Clerk-Recorder's website one of the County of Orange's most visited site.
- As part of the department's website improvements, we greatly enhanced our webmaster system to be more responsive to our customers. Last year, over 5,000 inquiries were received and responded to by the department.
- In 2005, we added an Internet Application and Appointment system to our Vital Records Section. This allowed our customers to apply for certified copies of birth, death and marriage certificates from the comforts of their home or office via the Internet. Through this on-line system, our customers also have the ability to set a specific day and time appointment to pick up their copies in our office.
- The department also enhanced its telephone and customer response operations system. Department-wide, we receive approximately over 350 calls per day and are all handled by live customer service representatives.
- Over 3.4 million documents have been recorded electronically since program inception in 1997. This program was the first in the nation and continues to be cost-effective, convenient and secure for our customers and industry users.
- Beginning this past year, the department also continues to upgrade its Archive website. The website contains information on the history and mission of the Archives, descriptions outlining our collections, contains interesting Orange County trivia and is a vital resource for research projects. On average, 72,000 people access this website annually.
- The Archives Unit also copied 690 original microfilm tapes containing over 275,000 images that were deteriorating in an effort to ensure appropriate archival of documents and meets federal preservation standards.

- The Archives also provided throughout 2005 ten historical presentations at the Board of Supervisors meeting, with topics ranging from the birth a several Orange County cities, the history of the Orange County Civic Center, Disneyland's 50th Anniversary and the 100th anniversary of the Orange County Register.
- Finally, we converted nearly 21 million of our official and vital record documents from paper to digital format. Department-wide, this reduced the retrieval, handling and processing time of all respective documents for our customers to just a few minutes.

Other accomplishments for the department's operation are listed in the Appendices.

II. MISSION & 2006 DEPARTMENT GOALS

A. Mission Statement

The Clerk-Recorder's mission statement includes the commitment of each employee in confirming our desire to provide the highest level of service to the public we serve.

"The Clerk-Recorder Department's mission is to provide a reliable repository for public records and to provide efficient service to the public in a way that exemplifies the highest standard of courtesy, cost effectiveness, and ethical performance. Public records will be readily accessible in a convenient manner while safeguarding confidentiality and the security of those records."

B. 2006 Department Goals

Building on our 2005 achievements, the department will continue to strive for excellence in serving our customers. To that end, the Clerk-Recorder Department's goals for 2006 are to:

1. Provide prompt and reliable service to the public
2. Enhance public records accessibility
3. Safeguard security of the public's records

Listed on the following pages are the descriptions, key outcome indicators and key outcome indicator reports for the department's 2006 goals.

GOAL #1: PROVIDE PROMPT AND RELIABLE SERVICE TO THE PUBLIC

Key Outcome Indicator: Continue receiving customer input and satisfaction surveys, which rate overall value of our service to the public.

The value of the service the department provides is a key component of our mission statement. One method to rate our service by our customers is to encourage public response, input and feedback for our services.

Our public service staff strives to provide the best customer service possible. The Clerk-Recorder Department diligently monitors and analyzes feedback received from the public regarding the quality of our service.

In 2005, we received over 4,000 customer responses and customer comment cards. Ninety-eight percent of the responses were positive and the average comment card rating category was “outstanding” or “very good.”

Last year, the department implemented an online survey on our website. On average, over 400,000 people will access our website annually, including those comments and inquiries to the department’s webmaster. In conjunction to the website online survey, we also implemented 25 customer public terminals with an online customer survey.

Key Outcome Indicator Reporting for Goal #1:

Outcome Indicator	FY 04-05 Results	FY 05-06 Plan	FY 05-06 Anticipated Results	FY 06-07 Plan	How are we doing?
Survey forms and customer responses measure customer satisfaction and ensure best practices in addressing customer needs.	Survey results are 98% above standard	Survey results are targeted to be 98% above standard	Survey results are targeted to be 98% above standard	Survey results are targeted to be 98% above standard	In 2005, we received over 4,000 responses and comments, including 1,500 webmaster inquiries. 98% of the cards and responses were positive and the average card category rating was “outstanding” or “very good.”

GOAL #2: *ENHANCE PUBLIC RECORDS ACCESSIBILITY*

Key Outcome Indicator: **The number of documents utilizing Electronic Recording.**

In an effort to maintain the highest level of service, the department will continue to automate the major functions within the Clerk-Recorder areas of responsibility. In the coming year, the department will also continue to redesign and implement enhancements to our website for increased efficiency and public accessibility.

Because of the continuing trends in the real estate market, including relatively low interest rates, increased property values and a high numbers of refinances, the Clerk-Recorder Department posted over one million recorded property-related documents for the fourth consecutive year. And, due to our expanded efforts, also increased the percentage of those documents processed electronically for the fourth straight year. One of the year's highlights of enhancing public records accessibility was by successfully increasing the number of users to our Electronic Recording system, which currently represents approximately 90% of the title companies in Orange County.

Consequently, because of this increase in users, we again increased the percentage of recorded documents processed electronically. For this past year, nearly 48% of all documents were recorded electronically.

b. Key Outcome Indicator Reporting for Goal #2:

Outcome Indicator	FY 04-05 Results	FY 05-06 Plan	FY 05-06 Anticipated Results	FY 06-07 Plan	How are we doing?
<i>What:</i> Increase the percentage of recordings processed electronically.	46% of the total recordings submitted were processed electronically.	At least 50% of the total recordings submitted will be processed electronically.	48% of the total recordings submitted will be processed electronically.	At least 50% of the total recordings will be submitted electronically.	For the 2005 calendar year, 48% of the documents were submitted electronically.

GOAL #3: SAFEGUARD SECURITY OF THE PUBLIC RECORDS

Key Outcome Indicator: Number of records converted to alternate media to ensure ease of access and preservation and safety.

The department's Archives unit provides off-site historical record storage and retrieval services. In addition, our Archives program offers state of the art microfilm to computer output. In 2005, over 275,000 images that were deteriorating were converted to state of the art polyester film. As part of safeguarding these images, a set of the document film was placed in an offsite secure location in the event of a disaster.

Also in 2005, the department converted nearly 21 million of our official and vital records and indices to digital format. This ensures a greater degree of preservation and safekeeping of the documents for our customers.

In addition, this reduced the retrieval, handling and processing time involved for customer requests of all respective documents to just a few minutes. These conversions also enhanced the security involved with issuing a confidential record and allows for the enhancement of security audits and supervisor reports and logs.

Key Outcome Indicator Reporting for Goal #3:

Outcome Indicator	FY 04-05 Results	FY 05-06 Plan	FY 05-06 Anticipated Results	FY 06-07 Plan	How are we doing?
What: Number of conversion of documents to digital format.	1. Over 250,000 Clerk documents were processed to digital images. 2. 1.1 million paper property documents were processed to digital image. 3. 19 million property images were converted from microfilm to computer image.	1. 85,000 vital records will be processed to digital images. 2. 41,000 Notary Registrations will be converted to digital format. 3. 12,000 Oath of Office paper certificates will be converted to digital image.	Over 20 million documents, including vital records, recordable documents and Fictitious Business are targeted for processing to digital image.	Continue conversion of most major function areas of the department to digital format.	In 2005, the department converted nearly 21 million images and documents to alternate digitized media to increase public access and preservation.

III. 2006 OPERATIONAL PLAN

Before addressing the challenges and strategies for the department's 2006 goals, the following is a brief overview of the functions and operations of the Clerk-Recorder Department.

The Clerk-Recorder Department is comprised of two (2) major divisions:

- Recorder Services and Systems - which records and processes real property documents and supports office wide automation; and
- Clerk Services, Archives, and Administration - which issues marriage licenses, accepts passport applications, files fictitious business statements, provides birth, death and marriage certificates, handles official records requests, maintains the County Archives, and provides office-wide administrative support.

The County Clerk-Recorder is responsible for examining and recording all documents presented for recording that deal with establishing ownership of land in the county, or as required by statute, and maintains a permanent record and indexes of all documents for public access.

In addition, the Clerk-Recorder provides certified copies requested by the public; recording of all lawful documents such as grant deeds, deeds of trust, judgments, liens, affidavits, Uniform Commercial Code Financial Statements, accepts Passport applications, and the filing of Births, Deaths, and Marriage records.

The Clerk-Recorder files records of surveys, parcel maps, subdivisions, and assessment maps and Assessor's Plot Maps. The department also issues Marriage Licenses; Fictitious Business Name Statements; licenses for Photocopier, Process Server and Unlawful Detainer Assistance; performs civil wedding ceremonies; administers oaths of office; and maintains Official County Records and indices for documents pertaining to the above activities.

There are 102 Clerk-Recorder staff members. When compared to other Clerk-Recorder Offices in large counties, Orange County has the lowest staff-to-population ratio in California. This is primarily due to the department's focus on enhanced automation and employee cross-training program.

The quality of our workforce continues to increase. Cross training, teamwork and commitment to public service make our employees the department's most valuable asset. Over the past year, staff resources have been stretched due to record volumes of real property recordings. Our employees commitment to "getting the job done," coupled

with the use of extra-help staff for the heavy volume of work, ensures the public that documents will be recorded in a timely manner.

Focus

The focus of this year's planning is in the area of enhanced automation to expand access to public records, streamline operations for faster, more cost efficient services, and maximize document security to reduce opportunities for identity theft and fraud.

We continue to focus on new automation techniques and public outreach to enhance service levels for the general public and our users.

Clients

The department provides services to the public at large, including current and past Orange County residents. Other specific clients are referenced below:

1. External:
 - Title and escrow companies
 - Lending institutions
 - Business owners
 - Contractors and sub-contractors
 - County Notary Public's
 - Internal Revenue Service and Franchise Tax Board
 - Parents registering their children for school or sports teams use
 - State agencies and Orange County cities that share in revenue collection from various units in the office
 - Historians, Genealogists and Researchers
2. County of Orange:
 - Board of Supervisors
 - County Executive Office
 - Tax Collector-Treasurer
 - Health Care Agency
 - Assessor's Office
 - Historical Commission
 - District Attorney's Office
 - Department of Child Support Services
 - Sheriff-Coroners Office

Regarding the issues of concern to our clients, identity and real estate fraud continues to be of major statewide concern. Enhanced interaction with client groups including the California Attorney General's Office, the District Attorney's Offices, other county agencies, local police departments and the Orange County Grand Jury are currently underway to address this growing concern.

Another area is the trend of real property recordings that necessitates the increased use of Electronic Recording (ER). In order to ensure timely property recordings, introducing additional title companies, escrow companies, and lending institutions into the ER program continues to be a priority for the department. This includes our participation in the state Attorney General's Electronic Recording Committee for ensuring safe operational guidelines for all counties that may provide electronic recording services.

Financial Resources

The FY 2004-05 overall financial resources for the department was approximately \$98 million. Most of these dollars are pre-obligated per state statute as pass-throughs to other governmental entities. This amount is broken down into three (3) major components.

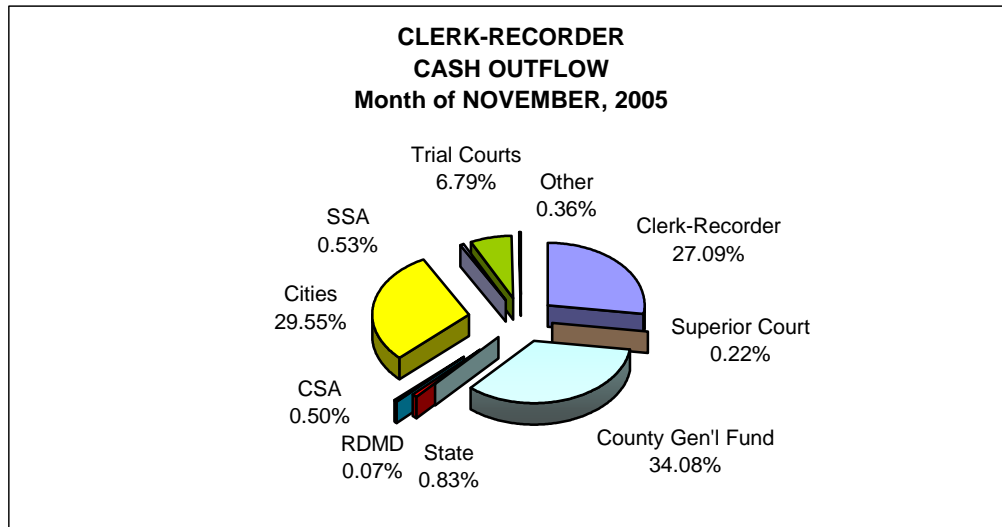
Below is a brief explanation for each category:

- I. General Fund Contribution** **\$6.9 million**
This is the budgeted contribution to the County's general fund and is expressed as a negative net county cost to the department.

- II. Clerk-Recorder Operations** **\$10.0 million**
This is the annual operations budget or appropriations for the actual running of the department. This includes all costs associated with salaries, services and supplies, fixed assets and applicable costs.

- III. Mandated Distribution Obligation** **\$81.0 million**
Mandated by state statute, portions of fees collected for various services by the department, including, but not limited to marriage licenses, fictitious business names, vital records, recording of real property documents are required by law to be distributed to other various government programs; such as Domestic Violence, Victim Witness and Family Conciliation Courts.

As stated earlier, the majority of the dollars we collect are pre-obligated through state statute as pass-throughs to other governmental entities and services. The graph below illustrates how collected fees are disbursed.



As an example of a state mandate pass-through, the cost of a public marriage license is \$61.50, of which our department retains \$26.50. The other \$35.00 is dispersed by the Clerk-Recorder Department to other government entities as mandated by state statute. Not all fees collected by the department are uniform in the disbursement to other governmental entities. Each fee has a different disbursement allocation according to applicable state statute.

Price to Public	Family Conciliation Court	Domestic Violence	Orange County Victim Witness	State Vital Statistic Fund	County Clerk-Recorder
\$61.50	\$5.00	\$23.00	\$5.00	\$2.00	\$26.50

Building on our 2005 achievements, the department will continue to address the following three (3) goals in 2006:

GOAL #1 - Provide prompt and reliable service to the public.

Challenges

Providing services in local communities and reducing the number of trips to the downtown area to conduct business continues to be challenge for the convenience of our customers.

Another challenge for the department is the continuing pursuit of locating additional office space in our current building. Employee working and public access space is limited. As the number of customers we serve continues to increase, the volumes of records, documents and other office equipment we are required to maintain also continue to grow.

Developing a means to disseminate a description of our services (e.g., recording of real property documents, issuing of marriage licenses, providing birth, death and marriage certificates, etc.) to the public also continues to be a priority for the department. This is important for the general public in order to have the easiest and most accessible information to obtain our services. Determining the most effective outlet and process for community outreach provide workshops, work with the media and other external entities to highlight our services will continually be addressed.

A fourth challenge is the continual attracting, training, and retaining of reliable staff that enjoy serving the public. In addressing this challenge, as part of the interview process, applicants are required to read and respond to the department's mission statement. Also, employees are provided on-the-job training, with career goals/ aspirations addressed.

Strategy for Goal #1

The concept of providing a branch office has been a goal of the department for several years. With limited public transportation, inadequate parking opportunities and often long commute times to the downtown Santa Ana, branch offices are viewed as an ideal model to serve a greater proportion of the public by bringing the service to them as opposed to requiring the public to come to one location. This strategy is highlighted by the fact that in the last ten years, 63% of the county's population growth has occurred in the south Orange County region.

In order to better serve this growing customer base, we anticipate the opening of our new South County branch office in the Laguna Hills Civic Center in early 2006.

Also for 2006, we have improved both our customer service/telephone operating system. Our customers will now have the opportunity to speak to a “live” person with the implementation of the new phone program. In addition, an improved response system on our website will enhance customer information and responses, both in our operations functions as well as the Archives website.

In addition, we have added an Internet Application and Appointment system to our Vital Records Section. This will allow our customers to apply for certified copies of birth, death and marriage certificates via their computers. Our customer will also have the ability to set an appointment through this new system in order to pick up their copies in our office. This will not only reduce the data entry requirements for our staff, but will dramatically reduce, from 20 minutes to 5 minutes, the pick up time for our customers.

We will also move forward to incorporate digital photo technology to capture, import and store photo ID cards for the following four registrations: Process Server, Legal Document Assistant, Unlawful Detainer Assistant and Professional Photo Copier.

The department will continue to hire and train diverse staff to ensure bilingual skills, especially Spanish and Vietnamese, to meet the ethnic diversity of the community and to ensure good communication with our clients. To that end, we added a Spanish version to our website in order to better serve that segment of our customer base.

Finally, we will continue to educate the public and external clients regarding the Clerk-Recorder services and prevention of identity fraud through added confirmation notices, an outreach community program and additional information on our website.

Outcome Indicator for Goal #1:

We will continue to make available and encourage completion of the customer opinion/survey forms and increase our customer and client outreach efforts. The department will also continue to monitor the number of transactions submitted through the Internet.

Outcome Indicator Reporting for Goal #1:

Performance Measure	FY 04-05 Results	FY 05-06 Plan	FY 05-06 Anticipated Results	FY 06-07 Plan	How Are We Doing?
<p>What:</p> <p>a. Survey forms and customer responses measure satisfaction and ensure best practices in addressing current and future needs.</p> <p>b. Schedule at least one outreach presentation each quarter.</p>	<p>a. Survey results and responses are 98% above standard.</p> <p>b. One presentation was provided.</p>	<p>a. Survey results and responses are targeted to be 98% above standard.</p> <p>b. Two presentations were provided.</p>	<p>a. Survey results and responses are targeted to be 98% above standard.</p> <p>b. Three presentations are anticipated.</p>	<p>a. Survey results and responses are targeted to be 98% above standard.</p> <p>b. Five presentations will be planned.</p>	<p>a. In 2005, we received over 4,000 comments and inquiries. 98% of the responses were positive and the average card category rating was “outstanding” or “very good.”</p> <p>b. Public outreach is continuing to expand.</p>

GOAL #2- Enhance public record accessibility.***Challenges***

Utilization of the Internet for transacting volume business is necessary and provides for a cost effective means of conducting business. However, it is important to ensure that methods encompass the highest level of security for the accurate and safe transmission of documents, as well as data security for those individuals wanting to access information and records. The demand by the general public to make records more accessible is sometimes in conflict with the need to minimize opportunities for misuse of these same records. Our office continues to work diligently to ensure a balance.

Strategy for Goal #2

The department will continue to play an active role in the state Attorney General's Electronic Recording committee, which will assist in the establishment of guidelines for certifying an Electronic Recording System.

In conjunction with this effort, we will continue in 2006 to upgrade our current Electronic Recording System to include the capability for submitters to electronically record with Orange County as well as those other California counties accepting electronic documents through one system. The department also continues to increase the actual number of Electronic Recording submitters.

Implementation of the online Vital Record Appointment System is also a key factor in 2006. As mentioned earlier, the system allows the public to complete and submit their Vital Record application over the Internet. An appointment can be scheduled and orders processed and available for pick up at specific times. This will dramatically reduce the average time to obtain a certificate from 20 minutes to 5 minutes.

An upgrade to our Grantor/Grantee system to create a more comprehensive solution for building our electronic repository of information and images for recorded documents will also be a priority for next year. It will include a streamlined system to quickly scan bar coded documents and check for consistency between the number of pages and the bar code label. Images will then be sent to quality control where the image can be repositioned, pages deleted, etc.

Another one of our strategies for 2006 is to upgrade our current Fictitious Business Filing System. The system will include a streamlined data entry component that will eliminate the current need to index each filing. In addition, we will also incorporate an online Fictitious Business System that will allow the public to complete and submit their Fictitious Business filing over the Internet. The public will also have the capability to lookup existing registrations. The average time needed to apply for a Fictitious Business will dramatically be reduced from 20 minutes to 5 minutes.

Outcome Indicator for Goal #2:

The department will continue to increase Internet access to our functions, including maximizing the utilization of the public and industry users for our Electronic Recording process.

Outcome Indicator Reporting for Goal #2:

Performance Measure	FY 04-05 Results	FY 05-06 Plan	FY 05-06 Anticipated Results	FY 06-07 Plan	How Are We Doing?
What:					
a. Increase the number utilizing Electronic Recording through a secure monitored environment	a. 82 Recording Sites	a. 112 Recording Sites	a. 120 Recording Sites	a. 130 Recording Sites	a. Use of Electronic Recording is expanding annually
b. Establish Internet access where customers can complete forms for automated data entry and submission.	b. Increased the number of available terminals in the marriage area by seven.	b. Increase the number of available terminals in the vital records area by five.	b. Implement a counter and internet application Fictitious Business Filings.	b. Implement counter and Internet access for department units.	b. Online operations are expanding within the department.

GOAL #3- Safeguard security of the public records.***Challenge***

It is important to monitor both statewide and federal legislation in regards to public record security. The Clerk-Recorder Department is leading efforts to ensure Orange County's interests are protected in this area by cooperating with the state Attorney General's Office, participating in statewide professional organizations and working with our County's legislative delegation.

The Archive unit also faces the challenge of identifying and protecting records of long-term value. They must assist other county departments in determining which documents have historical value.

With the passage of AB 578, all persons entrusted with secure access to an electronic recording delivery system will be required to submit fingerprints to the Attorney General for a criminal records check. No person shall be granted secure access to our electronic recording delivery system if he or she has been convicted of a felony, has been convicted of a misdemeanor related to theft, fraud, or a crime of moral turpitude, or if he or she has pending criminal charges for any of these crimes. These requirements will change the way we currently do business, as well as how we hire and promote staff.

The department is reviewing automated options for ease of implementation, enhancing information on the web site and working with statewide organizations to ensure consistent implementation practices.

Strategy for Goal #3

We will upgrade our Grantor/Grantee system to create a more comprehensive solution for building our electronic repository of information and images for recorded documents. It will include a streamlined system to quickly scan bar coded documents and check for consistency between the number of pages and the bar code label. Images will then be sent to quality control where the image can be repositioned, pages deleted, etc.

In 2005, the department will continue our efforts with security consultants to identify areas of potential systems vulnerability.

We also plan to update our Memorandum Of Understanding (MOU) covering user/provider responsibilities in electronic recording to include additional security measures when necessary.

Our department will continue to ensure appropriate backup of documents, which meet or exceed State standards for preservation. For next year we will convert approximately 10 years of property record TIFF images to silver polyester microfilm. Polyester film is the

longest-lasting and most durable product on the market and this type of preservation exceeds the national archival standards.

Also within the Archive unit, we plan to create a digital audio/video archive collection or oral history program. It is important to document and preserve the stories/interviews of those individuals who have knowledge of county history, which has long-term historical value.

The department will continue to work in conjunction with CEO/Employee Relations and appropriate employee associations to ensure that all legal requirements are met in the implementation of AB 578.

Outcome Indicator for Goal #3:

Because of the historical importance, we will enhance the Clerk-Recorder's records management plan to upgrade and enhance the Orange County archival material.

We will also continue to ensure accountability over the public's revenue, which is collected and disbursed each year.

Outcome Indicator Reporting for Goal #3:

Performance Measure	FY 04-05 Results	FY 05-06 Plan	FY 05-06 Anticipated Results	FY 06-07 Plan	How Are We Doing?
What: a. Establish an Archives program and preserve county records.	a. The Archives acquired three new collections: Official Records microfilm, 1926-1953 O.C. Bankruptcy documents and Naturalization documents, 1919-1983.	a. Acquire at least two new collections including non-governmental material and non-paper items.	a. The Archives acquired the original Santa Ana newspaper, 1925-1929, as well as collection of Orange County history books.	a. Acquire additional material for the Archive collection including non-governmental material and non-paper items.	a. Full time Archivist and assistant are cataloging and promoting the Archives.

IV. APPENDICES

- A. Management Team**
- B. Labor Management Committee**
- C. Business Plan Team**
- D. Accomplishments**
- E. Organization Chart**

A. MANAGEMENT TEAM***Tom Daly, County Clerk-Recorder***

Oversees the attainment of goals and provides direction in all Department operations.

Renee Ramirez, Assistant Clerk-Recorder

Provides leadership and direction to assist the County Clerk-Recorder in planning, directing and organizing the operations of the Document Recording, Imaging, Official Records, Marriage License, Fictitious Business, Vital Records, Human Resources and Data Entry areas.

Phillip Tsunoda, Director of External Affairs

Provides leadership and direction to assist the County Clerk-Recorder in planning, directing and organizing the operations of the Archives and all external issues to the department, including intergovernmental and community relations and interaction with the media.

Paul Lanning, Administrative Manager

Provides leadership and direction to assist the County Clerk-Recorder in planning, directing and organizing the operations of Information Systems, Purchasing and Financial Services.

Mitse Cohodas, Budget Manager

Provides direction and support in long-and-short-range financial planning; prepares the annual budget, statistical reports, and oversees the Accounting Unit.

Hieu Nguyen, Chief Deputy Recorder

Under general direction, assists in planning, organizing, directing, and coordinating the activities of the Recordable Documents, Imaging, and Data Processing functions.

Susie Sullivan, Information Systems Manager

Provides direction in the planning and implementation of information technology for the Clerk-Recorder Department. Major responsibilities include all automation operations, local network operation, and all office automation technical support.

B. LABOR MANAGEMENT COMMITTEE (LMC)

Tom Daly, Sponsor - Encourages LMC activities and monitors team progress.

Renee Ramirez, Management Team Leader - Manages the team; builds commitment and leads the team in problem solving.

Darcy Ebberts, Labor Team Members - Builds commitment, provides problem solving, develops ideas, actively participates in process, assists in cost-saving suggestions and provides input to the Business Plan.

Lou Porras, OCEA Representative - Focuses on process and guides the team into selecting tools and methodologies.

The department's Labor Management Committee works independently and in coordination with LMC teams from the County Executive Office, Clerk of the Board, Registration and Elections and the Orange County Employees Association.

C. BUSINESS PLAN TEAM

Tom Daly - County Clerk-Recorder

Renee Ramirez – Assistant Clerk-Recorder

Phillip Tsunoda – Director, External Affairs

D. 2005 ACCOMPLISHMENTSClerk Functions

- In December of 2004, the department converted approximately 1.8 million official record images from microfilm to TIFF image.
- In December 2004, the department converted approximately 9,469 Oath of Office filings from paper to TIFF image. This enhances and accelerates the retrieval, handling and processing time involved in issuing a copy from 15 minutes to 5 minutes.
- The department had a record number of marriage licenses issued and marriage ceremonies performed in fiscal year 2004-5. The department is also on pace to surpass the number of marriage ceremonies in fiscal year 2005-06.

Recorder Functions

- Improved notification process and readability of Abstract Judgment and Mechanics Liens recorded with the department.
- The Clerk-Recorder's Office electronically provides the Assessor's Office with changes of property ownership title, parcel maps, etc. which are used to review property values and land splits.
- Among major breakthroughs for the Clerk-Recorder's Office in 2004, the number of title and insurance companies, city and other government entities that record electronically has grown from 82 in 2003 to 112 users. Electronic Recording (ER) customers submit an average of 2,500 documents daily, with the total number of electronically recorded documents exceeding 2.8 million since implementation in 1997.
- Electronic Recording, first introduced by Orange County in the spring of 1997, is of great benefit to both the public and private sectors. In 2004, an enhanced Memorandum of Understanding was implemented with participating ER users to ensure upgraded and enhanced security features.
- In December, the Department hosted an informative discussion and tour dedicated to electronic document recording with the Attorney General's staff. It is the goal of the Clerk-Recorder's Office to serve on the Attorney General's Electronic Recording Committee, which will help establish guidelines to certify Electronic Recording systems throughout the State.

- In November, Clerk-Recorder staff installed terminal servers. This enables other authorized County's agencies to access our computer programs directly through the Enterprise Data Center.

Archive Unit

- In 2005, the Archives presented ten (10) presentations to the Orange County Board of Supervisors on a variety of topics, including the history of various Orange County cities, the history of the county, Disneyland's 50th Anniversary and the 100th Birthday of the *Orange County Register*.

- In 2005, the Archives prepared and displayed the following two collections:

The Orange County Civic Center - Past & Present, which tells the story of the development of the Civic Center, using historic photographs and modern day images of various sites.

The Orange County Archives, which included a general overview of our entire collection.

- In 2004, the Archives assisted 1,035 research visitors. In addition, the Archives responded to over 2,000 telephone and email inquiries.
- The Archives updated its informational brochure outlining the various collections and services it offers.
- The Archives also made numerous presentations and speaking engagements to various historical groups in Orange County throughout the year.

CLERK-RECORDER ORGANIZATION CHART

